

Manage User Privileges

1 Introduction

Within each institution, at least one user is designated as the Admin Sponsored Research Officer/Business Officer/Administrative Officer (SRO/BO/AO). This user possesses special privileges, which allow them to perform the following actions:

- “Manage Institution Profile” – This privilege allows users to update institution information.
- “Manage Users” – This privilege allows users to manage the privileges of other registered users within the institution.
- “Submit to DOE” – This privilege allows users to submit various resources and documents to DOE, including revised budgets.

The purpose of this document is to provide step-by-step instructions for users to follow to Manage User privileges at the institution level.

2 Prerequisites

Before a user can Manage Users at the institution, the following criteria must be met:

- The user has an active, external PAMS account.
- The user has the “Manage Users” privilege.

3 Manage Users

Use the following steps to Manage Users' privileges at the institution level.

3.1 Managing Users from the Institution

1. Log in to your external PAMS account at (Figure 1): <https://pamspublic.science.energy.gov/webpamsepseexternal/login.aspx>.

Figure 1. PAMS External Login

2. Navigate to the Institutions tab (Figure 2).

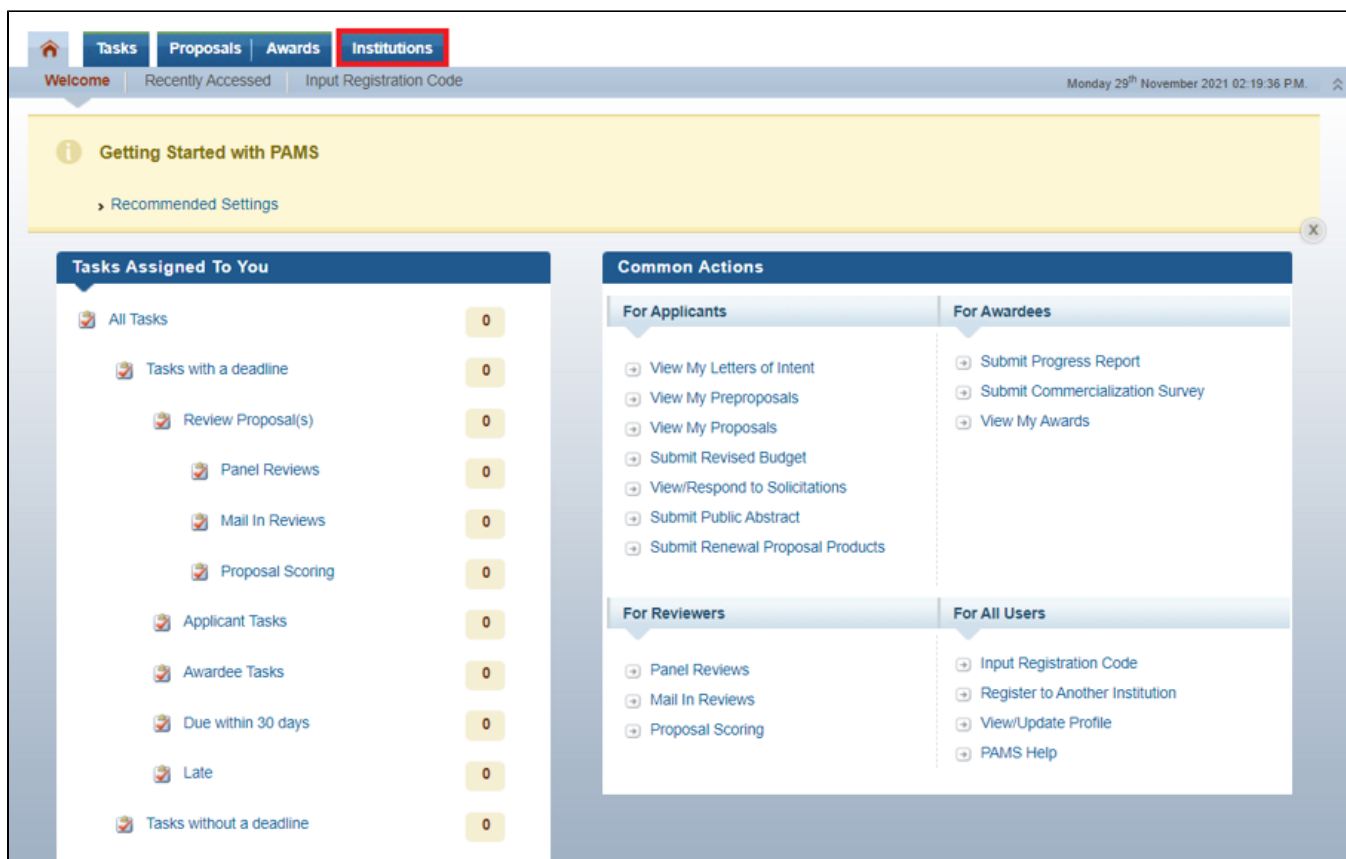


Figure 2. Home Page – Institutions Tab

3. PAMS will load the “Institutions – List” page, which lists all of the institutions you are associated with in PAMS. Browse the list or use the filters or advanced search above the grid to locate the proposal for which you would like to manage users. Once you have located the proposal, select **Manage Users** from the **Actions** menu in the Options column (Figure 3).

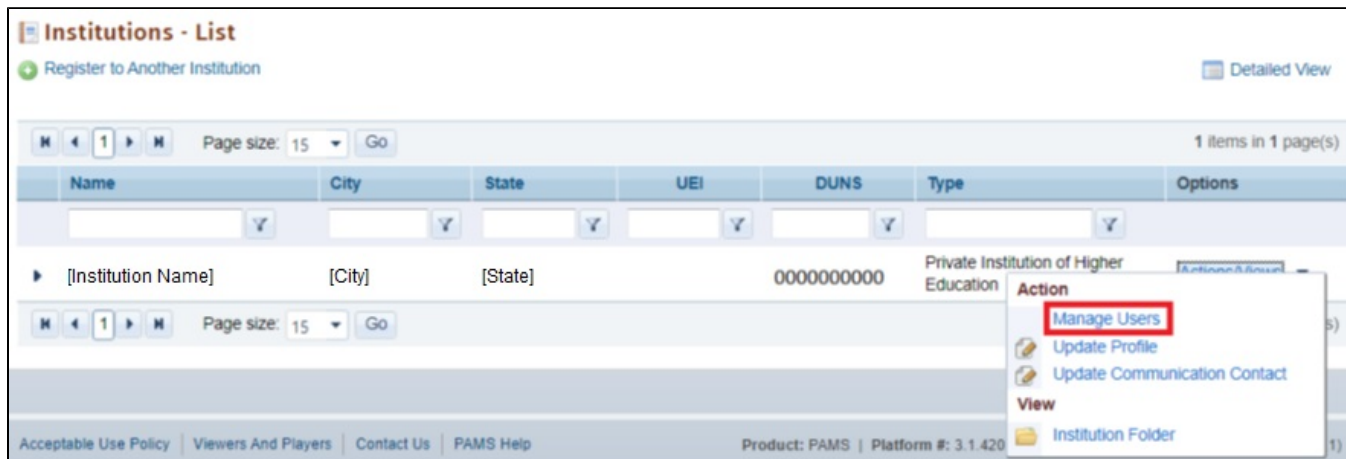


Figure 3. Institutions – List, Manage Users

4. PAMS will navigate you to the “Manage Users” page. There are five Manage Users options: **By Letter of Intent**, **By Preproposal**, **By Proposal**, **By Award**, and **By Users**. To search for and manage users for your institution, click the magnifying glass beside **By Users** (Figure 4).

Note

To manage users **By Letter of Intent**, **By Preproposal**, **By Proposal**, or **By Award**, refer to *How To: Manage Peer Access Permissions (Preproposal, Letter of Intent (LOI), Proposal, Award)*.

Manage Users

How would you like to Manage Peer Access? (To see all results, click search with empty search fields)

☒ By Letter of Intent

☐ By Preproposal

☐ By Proposal

☐ By Award

☒ By Users

Cancel

Figure 4. Manage Users, By Users

5. PAMS will load search parameters under **By Users**. Enter Last Name (like) and/or First Name (like), and click **Search** to narrow your results **OR** click **Search** with no parameters to search all users registered to your institution (Figure 5).

Manage Users

How would you like to Manage Peer Access? (To see all results, click search with empty search fields)

☐ By Letter of Intent

☐ By Preproposal

☐ By Proposal

☐ By Award

☒ By Users

Last Name like

First Name like

Cancel Search

Cancel

Figure 5. Manage Users, By Users, Parameters

6. PAMS will navigate to the "Manage Users – List" page. Browse the list or use the filters or advanced search above the grid to locate the user for whom you would like to manage peer access. Once you have located the user, click **Manage Privileges** in the **Actions** menu in the Options column (Figure 6).

Manage Users - List

▼ [Institution Name, City, State]

UEI: N/A DUNS: 000000000 Institution Type: Private
Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): [LastName, FirstName] EIN: 000000000

Search

Page size: 15 Go 1 items in 1 page(s)

Name	User Name	Email	Phone Number	Role	Options
[LastName, FirstName]	[Username]	[Email Address]	(000) 000-0000	Other	<div> <div>Action</div> <div> <div>Manage Privileges</div> <div>Remove from Institution</div> </div> </div>

Cancel

Figure 6. Manage Users – List

7. PAMS will navigate you to the “Manage User Privileges” page, which displays the user’s current roles and privileges. Roles include: PI, SRO/BO/AO, and Other. Privileges include: Manage Institution Profile, Manage Users, and Submit to DOE. Select the checkbox for each role or privilege you would like to grant the user (Figure 7).

8. Once you have made your selections, click **Save and Continue** in the bottom right corner of the page.

Manage User Privileges

▼ [Institution Name, City, State]

UEI: N/A DUNS: 000000000 Institution Type: Private
Institution of Higher Education

Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): [LastName, FirstName] EIN: 000000000

Search

User Information

Name	[LastName, FirstName]
Update Role(s)	<input type="checkbox"/> PI <input type="checkbox"/> SRO/BO/AO <input checked="" type="checkbox"/> Other
Update Privileges	<input type="checkbox"/> Manage Institution Profile <input type="checkbox"/> Manage Users <input type="checkbox"/> Submit to DOE

Cancel **Save and Continue**

Figure 7. Manage User Privileges

9. PAMS will return you to the “Manage Users – List” page, and display a Success message confirming that the user’s privileges have been updated successfully (Figure 8).



Figure 8. Manage Users – Success

3.2 Manage Users – Remove from Institution

During the course of an award's lifecycle, the Admin SRO/BO/AO may need to remove a user from the institution entirely. Use the following steps to remove a user from an institution.

1. Refer to Section 3.1 Manage Users from the Institution, steps 1-6 above to navigate to the “Manage Users – List” page.
2. Browse the list or use the filters or advanced search above the grid to locate the user whom you would like to remove from the institution. Once you have located the user, click **Remove from Institution** in the **Actions** menu in the Options column (Figure 9).

The screenshot shows the 'Manage Users - List' page with a search bar at the top. Below the search bar, there are fields for 'UEI: N/A', 'DUNS: 000000000', 'Institution Type: Private Institution of Higher Education', 'Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): [LastName, FirstName]', and 'EIN: 000000000'. A 'Search' button is on the right. Below this is a table with columns: Name, User Name, Email, Phone Number, Role, and Options. The table has one row with a user's information. The 'Options' column has a dropdown menu with 'Action' selected, showing 'Manage Privileges' and 'Remove from Institution' (highlighted with a red box). A 'Cancel' button is at the bottom left.

Figure 9. Manage Users – List, Remove from Institution

3. PAMS will navigate you to the “Manage Users – Confirm Remove User From Institution” page. On this page, you have the option to enter comments pertaining to the user's removal from the institution. To remove the user from the institution, click **Confirm** in the bottom right corner of the page (Figure 10).

Manage Users - Confirm Remove User From Institution

Confirmation:
 Are you sure you want to remove First Name Last Name (Username) from the Institution?

[Institution Name, City, State]

UEI: N/A	DUNS: 000000000	Institution Type: Private Institution of Higher Education
Primary SRO/BO/AO (Sponsored Research Officer/Business Officer/Administrative Officer): [LastName, FirstName]	EIN: 000000000	

Remove User From Institution

Comment:

Approximately 1/4 page ⓘ (Max 500 Characters): 500 Characters left.

Cancel

Confirm

Figure 10. Manage Users – Confirm Remove Users From Institution

4. PAMS will navigate you to the “Manage Users – List” page, and display a Success message confirming that the user has been removed from the institution successfully (Figure 11).

Manage Users - List

Success:
 Successfully removed user from the institution.

Figure 11. Manage Users – List, Success

Note

When removing users from your institution, keep in mind that Principal Investigators (PIs) on active awards should not be removed until an Award Modification Request is created to Change the PI on the Award.